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FormMagic, Inc. — Tax-Mate 1099

Isaac M. O'Bannon • Sep. 08, 2011

FormMagic, Inc. — Tax-Mate 1099

2011 OVERALL RATING ★★★★★



888-746-0440

www.FormMagic.com

2011 Overall Rating 4.5

Best Fit

Accounting firms with large client bases, with varied import/integration needs.

Strengths

- Strong multi-client management tools.
- Multi-user level security.
- Multiple data entry options.
- Built-in diagnostics.

Potential Limitations

- Limited local forms.
- Lacks client billing/invoicing center.

Summary & Pricing

Tax-Mate provides a comprehensive 1099 and W-2 solution, with strong multi-client management tools and overviews, as well as batch printing options that can streamline forms generation. It includes unlimited e-filing for federal and all states through the federal agency piggyback process, but does not offer separate forms for state and local reporting. The well-designed interface offers multiple data-entry options and is easy to learn and use. Tax-Mate 1099 Advisor costs \$299 per year for any number of in-firm users. Versions of the system for users with less complex needs start at \$95.

Product Delivery Methods

On-Premises

SaaS

Hosted by Vendor

Basic System Functions 4.75

Reporting 4.25

Import/Export Capabilities 4.25

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